These exercises provide a quick overview so that you can practice some of the basic concepts and features for Web Intelligence (WebI). For additional information about using WebI tools, reference the Enterprise Reporting (ER) page on the OFM IT Systems website.

Need help? Contact the OFM Helpdesk.

HereToHelp@ofm.wa.gov 360.407.9100

Log on (BI launch pad)

Authorized users can log on with their enterprise reporting (ER) user ID/password from inside the state government network (SGN) or via Secure Access Washington (SAW).

1. **Open:** Browser.
2. **Input:** ER URL/address
   https://reporting.ofm.wa.gov

🔒 **https://reporting.ofm.wa.gov** ☆

➔ Use Secure Access Washington (SAW) if you need to log on outside of the state government network (SGN).

3. **Input:** User name.
4. **Input:** Password.
5. **Select:** Sign in.

➔ After you sign in, the BI launch pad home page will be displayed.

➔ To log off, close your browser window.
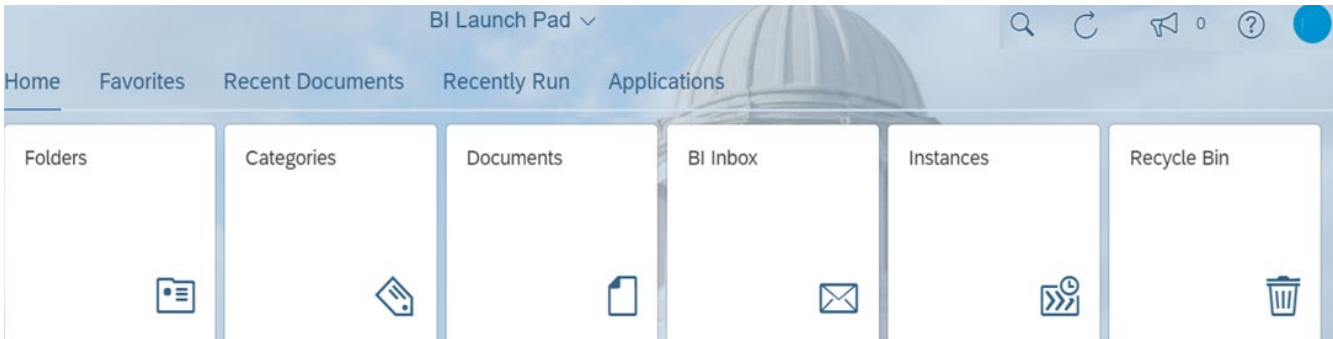
Log in to BI Launch Pad

User Name

Password

Sign in

Forgot password, User name, or Enable your account

➔ In this example, the BI launch pad home page is displayed.

BI Launch Pad ∨

Home   Favorites   Recent Documents   Recently Run   Applications

| Folders | Categories | Documents | BI Inbox | Instances | Recycle Bin |

Exercise 1: Create and save basic query document

Use this exercise to create a basic query and save it to your personal folder.

✓ The steps and samples in this exercise provide a high-level overview so that you can practice using some of the WebI tools. For additional information, reference the [Enterprise Reporting (ER) page](#) on the [OFM IT Systems website](#).
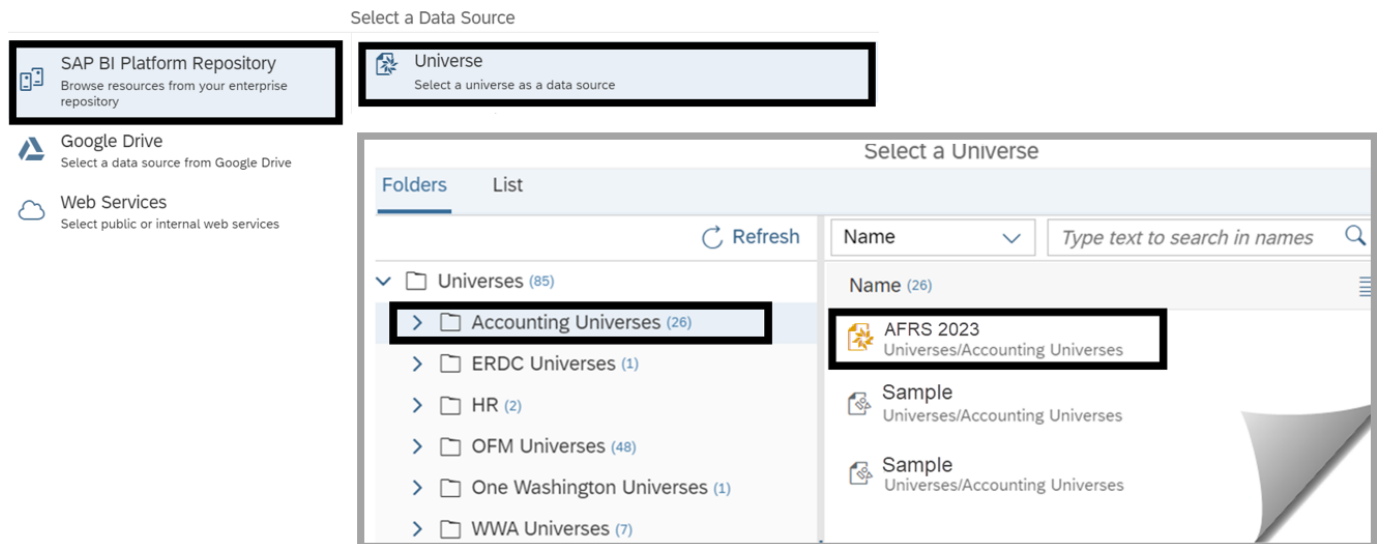
Open WebI application

From the BI launch pad, select applications > Web Intelligence.
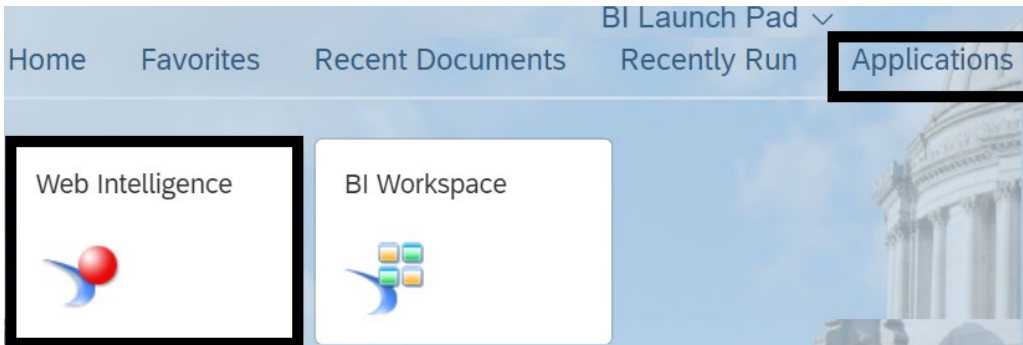
Select data source

WebI will prompt you to select a data source. For this exercise, select the current AFRS universe.

Add objects from universe to result objects/query filters

Drag and drop objects (or double-click objects) for the result objects section then drag and drop objects for the query filters section.

✓ The result objects section and query filters section both include arrows to add (>) and remove (<) objects to build your query. If you prefer to use the arrows, select an object (use control key to select multiple objects) then select the add (>) arrow in the relevant section.

Result objects section - use these values for this exercise	
Object	**Located in universe object class**
Fiscal Month	Time Class
GL Account	GL Account Class
GL Account Title	GL Account Class
Account	Account (Fund) Class
Object	Object Class
Object Title	Object Class
Amount	Measures Class
Query filters section - use these values for this exercise	
Object	**Located in universe object class**
Agency	Agency Class
Fiscal Month	Time Class
GL Account	GL Account Class
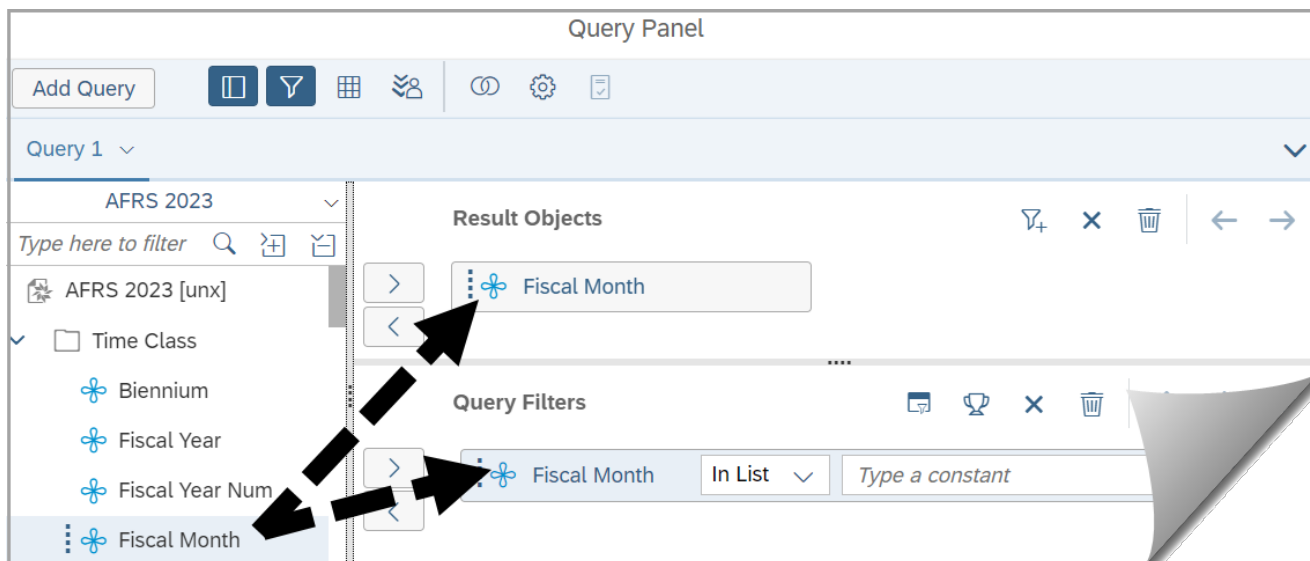
Apply filter operators to narrow the focus for the query results

Agency filter operator: use equal to and input your three-digit agency number (or use in list with values from list to select one or more agencies).


Fiscal month filter operator: use equal to and input 12 (or use in list with values from list to select value).

GL account filter operator: Use matches pattern and input 65%. The percent sign (%) is a wildcard character (in this example, the GL account filter will select all values that begin with 65).

✓ Using the matches pattern with a wilcard can be useful when you need to find data that begins with, ends with, or contains a specified value. For example, you can create a filter to find vendor names that start with a specified word or find GL account codes that include a specified value, etc.
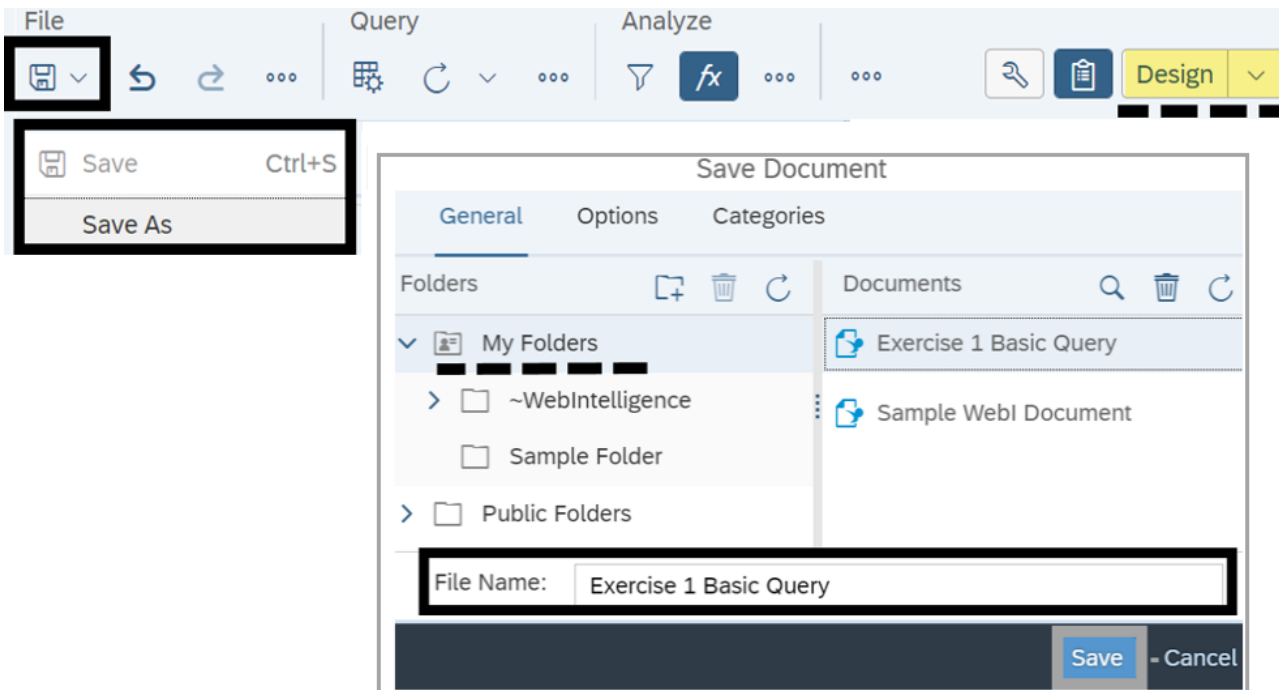
Run query

Select run (located in lower right corner).
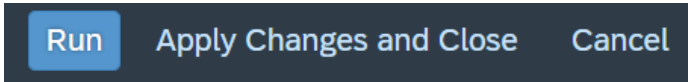
Save document

After you run the query, the results will be displayed on the report page in design mode. Save the document to your personal folders (use Exercise 1 Basic Query for the file name).

Close document and return to home page

Select the home icon (located on left side of top banner) on the report page to close the document and return to the WebI launch pad home page.

Exercise 2: Modify Query/Create Nested Filter

Use this exercise to modify your saved query and create a nested filter.

✓   The steps and samples in this exercise provide a high-level overview so that you can practice using some of the WebI tools. For additional information, reference the Enterprise Reporting (ER) page on the OFM IT Systems website.

Find and modify document

Find your document in the personal folders then right-click the document and select modify. For this exercise, you will modify your exercise 1 basic query document.
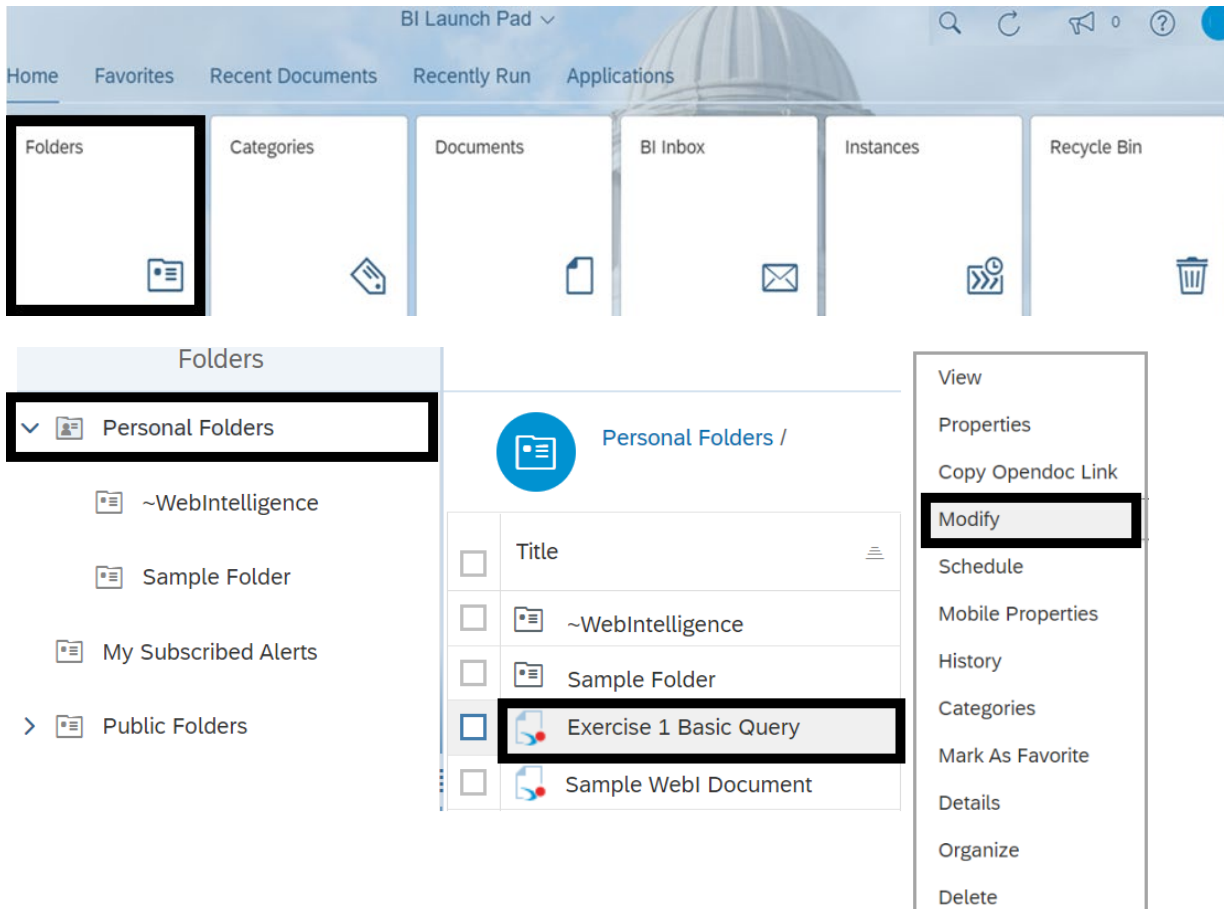
Navigate to query panel from report page

Your document will be displayed on the report page in design mode. Select edit (located on the upper toolbar) to navigate to the query panel from the report page.
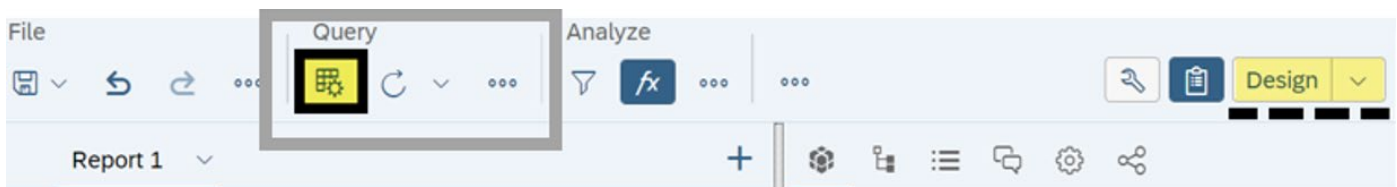
Apply filter operator to change the focus for the query results

Change the filter operator for the fiscal month filter from in list 12 to between 01 and 12.

Combine query filters (create nested query filter)

Drag and drop the fiscal month object so that it overlaps the existing fiscal month query filter (you can drag and drop the object from the universe structure or from the result objects section) then change the filter operator to in list 99.
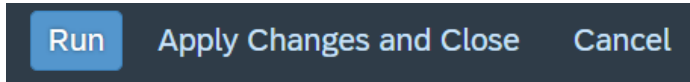
✔ We are using the drag and drop option to create a simple nested query for this exercise. If you accidentally drag and drop the wrong object or place it in the wrong location, select the item and use the remove option in the query filters section. There is also an icon in the query filters section to add a nested query that advanced users might find helpful when creating more complex nested filter conditions.
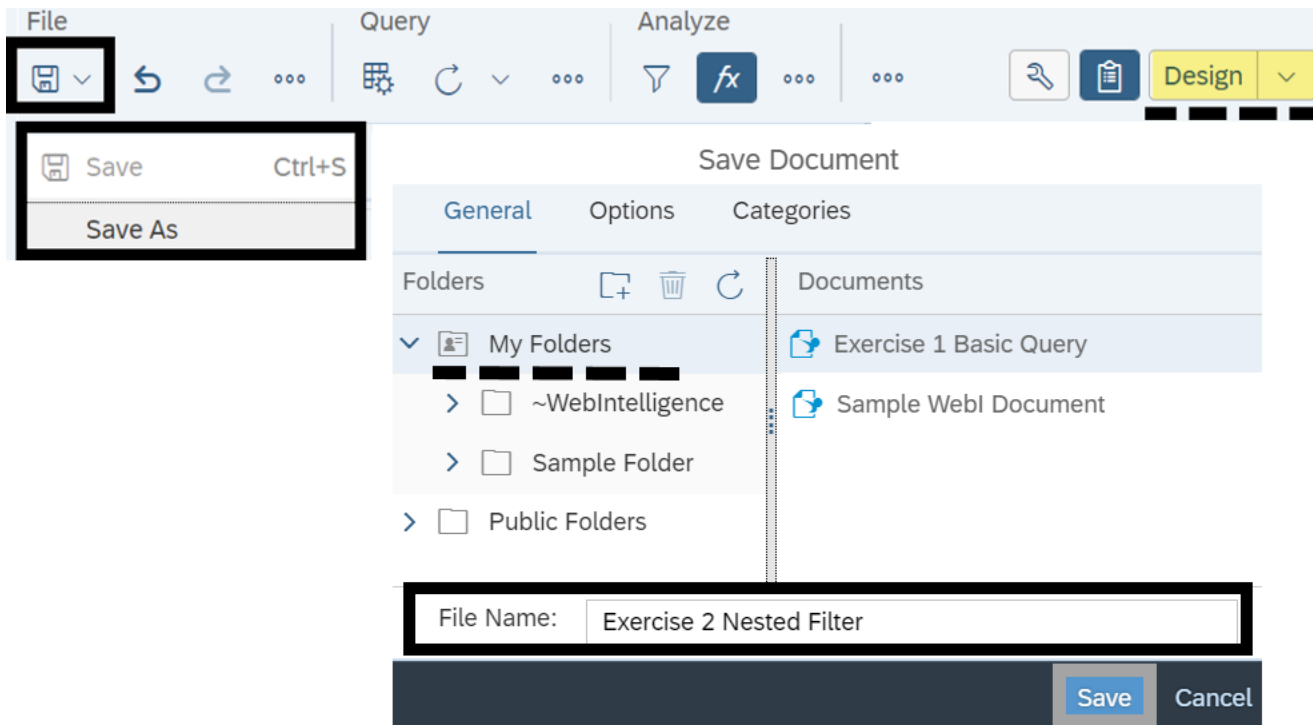
Run query

Select run (located in lower right corner).

Save document

After you run the query, the results will be displayed on the report page in design mode. Save the document to your personal folders (select save as and use Exercise 2 Nested Filter for the file name).

Close document and return to home page

Select the home icon (located on left side of top banner) on the report page to close the document and return to the WebI launch pad home page.
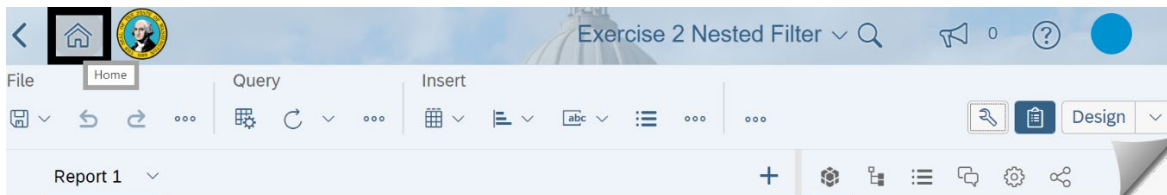
Exercise 3: Add Simple Sum Calculation

Use this exercise to add a simple sum calculation so that you can display a grand total of values at the end of a report.

✓ The steps and samples in this exercise provide a high-level overview so that you can practice using some of the WebI tools. For additional information, reference the Enterprise Reporting (ER) page on the OFM IT Systems website.
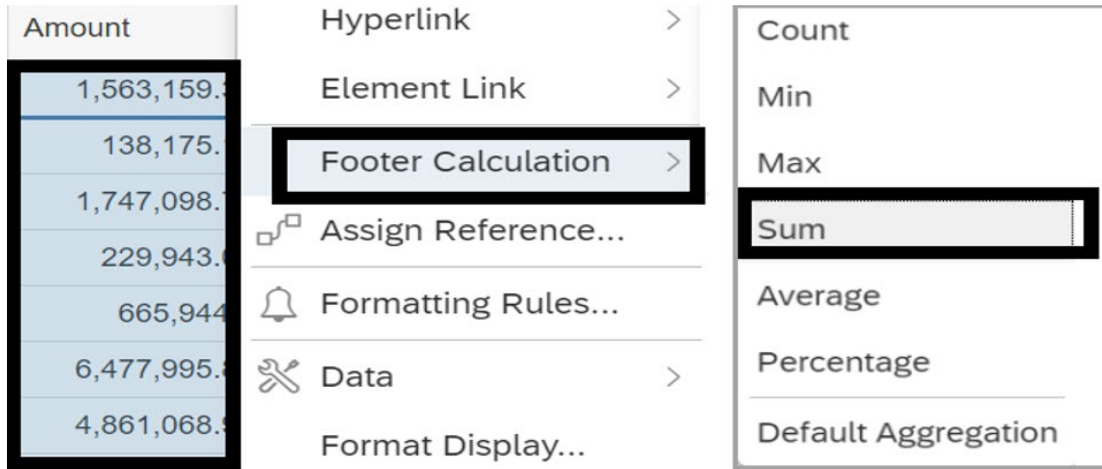
Find and modify document

Find your document in the personal folders then right-click the document and select modify. For this exercise, you will modify your exercise 2 nested query document.
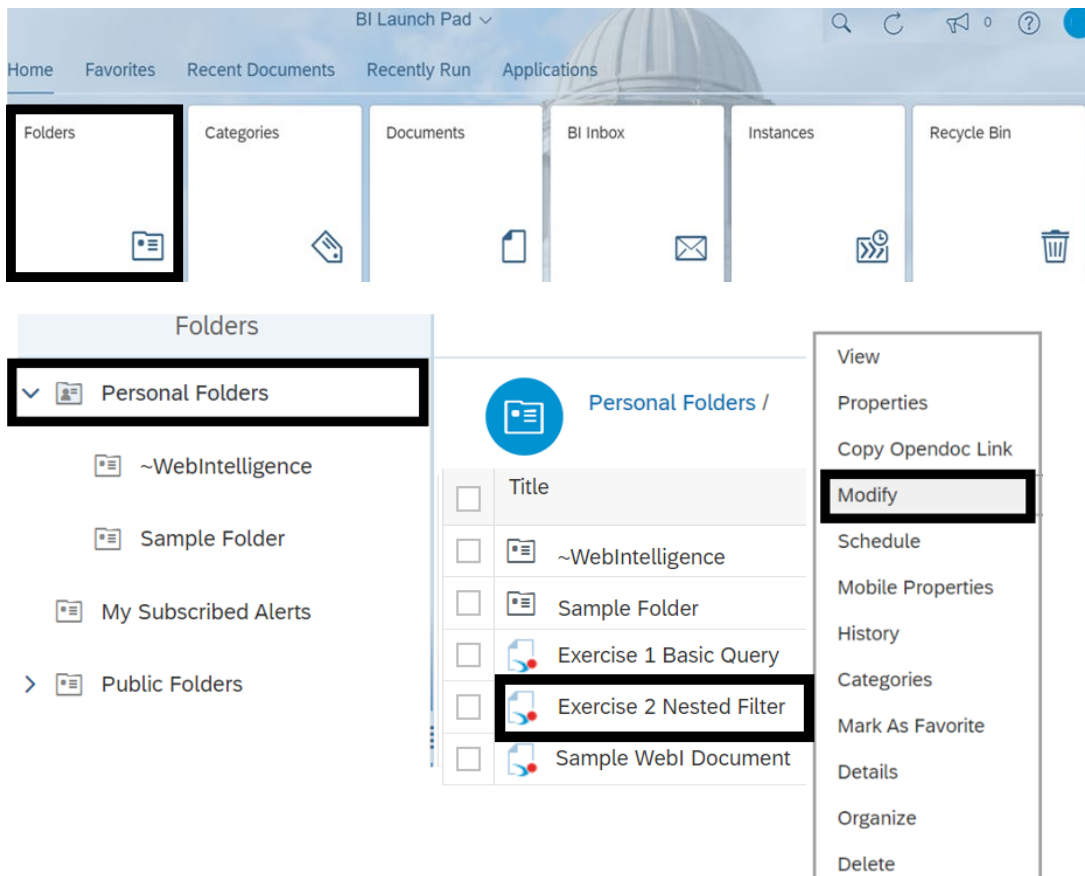
Add footer calculation on report table

Select data cells in the amount column on the report table so that the amount column is highlighted (you can double-click a cell in the amount column or select anywhere in the report table and then select a cell in the amount column). After the amount column is highlighted, right-click a cell in the amount column to display additional options. Select footer calculation then select sum.

✓ For this exercise, you will remain on the report page in design mode (if you accidentally navigate to the query panel, you can run the query to get to the report page again).

Amount
1,563,159.
138,175.
1,747,098.
229,943.
665,944
6,477,995.
4,861,068.

Hyperlink >
Element Link >
Footer Calculation >
Assign Reference...
Formatting Rules...
Data >
Format Display...

Count
Min
Max
Sum
Average
Percentage
Default Aggregation

Navigate to last page of report

The sum total (grand total) will be displayed at the end of the report. Use the page navigation option (located on the upper toolbar) to scroll to the last page of the report.
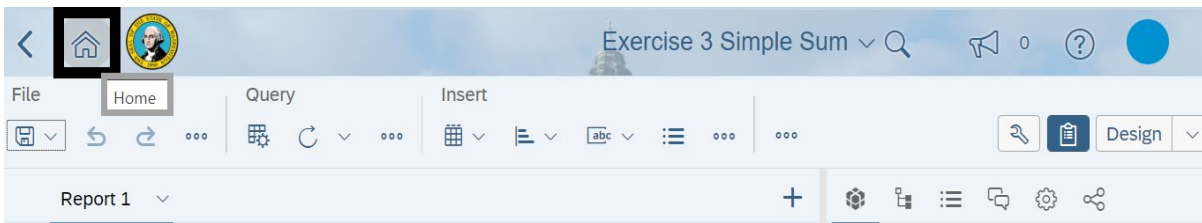
Display

000   Navigate

|<   <   1   of 1+   >   >|
Last page

Save document

Save the document to your personal folders (select save as and use Exercise 3 Simple Sum for the file name).
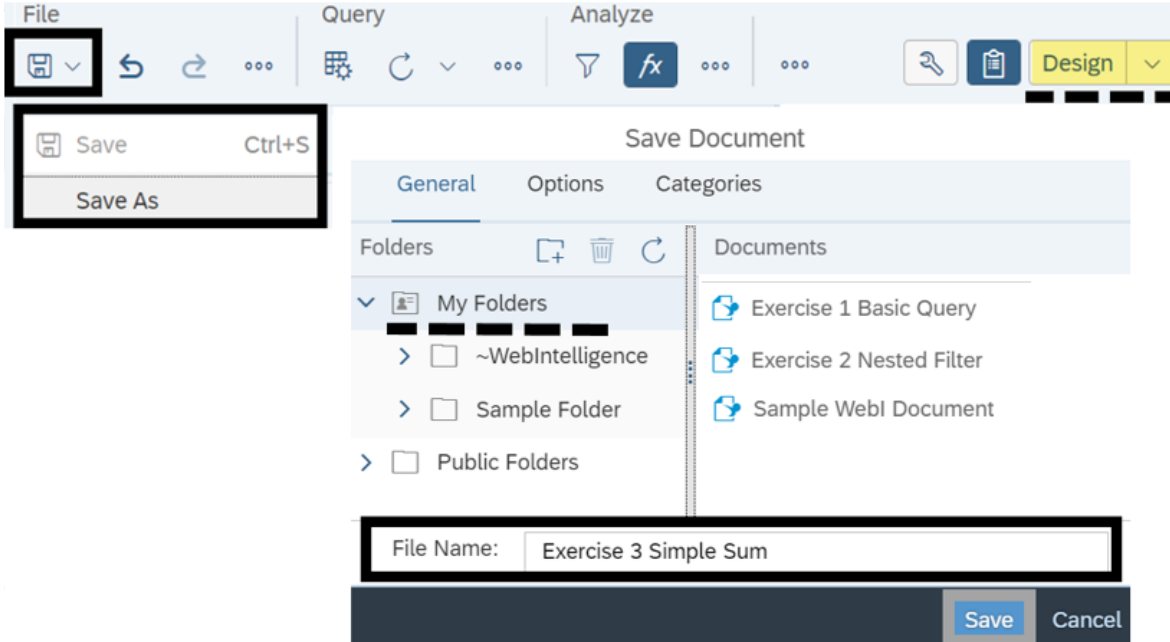
Close document and return to home page

Select the home icon (located on left side of top banner) on the report page to close the document and return to the WebI launch pad home page.

Exercise 4: Delete Documents

Find your documents in the personal folders then right-click your document and select delete. You can also select multiple documents then right-click to delete the selected documents.

WebI - Sample Exercises (Basic)
Need help? Contact the OFM Help Desk HereToHelp@ofm.wa.gov 360.407.9100

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